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ABSTRACT

Successful salary and wage studies require the establishment of a study team, access to documentation, and the participation of school district personnel. Team leadership can be supplied by the personnel department or by the use of a consultant. If only consultants are employed, a steering committee should be established to furnish information to all personnel. The first phase of Part 1 of the suggested plan involves a review of the documentation and preparation for the subsequent studies; the second phase involves an analysis and rating of the positions and an assessment of function placement; the third phase involves the insertion of jobs into salary and wage schedules or into sections of a unified salary and wage schedule; and the fourth phase involves the classification of job descriptions. In the first phase of Part 2, the salary, wage, and classification data are gathered and examined; in the second, salary and wage schedules are developed; and in the third, jobs are inserted into salary and wage schedules or into sections of a unified salary and wage schedule. The first and second phases of Part 3 involve the development of a management plan; the second two involve the development of a method for salary compensation. One figure is included. (RG)

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A PLAN FOR CONDUCTING A COMPREHENSIVE WAGE AND SALARY STUDY

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A Plan for Conducting a Comprehensive Wage and Salary Study

The ability of a school system to attract and retain an outstanding workforce is affected by a number of forces, including wages and salaries and the structures used to determine them. While a large number of arguments may be cited as features of desirable wage and salary structures, the fact remains that the most desirable structures (schedules) are the ones most readily accepted, understood and appreciated by the members of the work force. Such schedules generally insure the school system's commitment to both internal and external equity. That is, the schedules reflect fair treatment across job grades, experience steps and, where possible, performance ranges, while remaining competitive within the existing labor market. One method for assisting boards of education in making decisions regarding wages and salaries is suggested in the following plan.

The plan begins with a discussion of prerequisites which must be addressed in order to effectively complete a wage and salary study. Addressed is a proposed work plan, which describes in detail, approaches for the various parts, phases, and tasks to be performed.

Prerequisites which require attention are:

1. The formation of a study team which may consist of personnel from within and/or outside the system,
2. The availability of existing documentation,

and

3. The participation, involvement, and availability of School System Personnel in the study.

It is critical to the success of any wage and salary study that documentation be available from the beginning of the study. Personnel of the system must be committed and must participate in the study as members of committees, as respondents to questionnaires and interviews, and as providers of various documents and other information including guidance in the conduct of the study. Both elements are discussed in greater detail in the following three sections.

The Study Team

A study team composed of members selected from within and/or outside the school system can provide the manpower, direction, and knowledge to complete the study. Members of the team chosen from within the system should meet certain criteria such as the following:

1. interest in participation,
2. cross-section of employees by job classification, and
3. knowledge of jobs and current wage and salary structures.

Should the board desire to employ external consultants, consideration of the followiing qualifications would be helpful:

1. expertise in school personnel administration, particularly in wage and salary administration,
2. demonstrated proficiency through verifiable experience in previous studies, and
3. a willingness and ability to perceive and deal with the uniqueness of the individual school system.

Overall team leadership can be provided by the personnel department or by use of an external consultant.

Existing Documentation

A thorough understanding of various background information is necessary. In order to gain such understanding, the School System should have available the following documents at the outset of the study:

1. Organization charts,
2. Board policies regarding salary/wage compensation, administrative reorganization, position management, position classification, and all other policies bearing directly upon the requirements of the study.
3. Existing salary/wage schedules.
4. Existing position descriptions,
5. Work locations of employees, and
6. Any other documentation bearing directly upon the requirements of the study.

The early provision of these documents will not only enable the study to be completed in a timely manner, but also

will allow the study team to use the documents for structuring various data gathering methods and to reduce the probability of making errors which may require duplication of effort or may lead to incorrect conclusions.

Participation, Involvement, and Availability of School System Personnel

Personnel serve as study resources to provide various information, including responses to interviews and questionnaires. In some tasks both supervisors and subordinates will be required to provide information.

Throughout the study there will be several key decision points. Appropriate personnel will be required to make decisions on various options or at points where the study cannot proceed without specific direction. In the event the system decides to employ only outside consultants, an steering committee should be established. This committee could consist of the Assistant Superintendent for Personnel Services, Director of Certified Personnel, Director of Classified Personnel, a supervisor, a clerical, and a craft employee.

A study of this nature will be conducted in a very sensitive area with impact upon a large number of people. The issues involved are complex and will frequently be subject to differences of interest and opinion. Under such

conditions it is proper that the steering committee provide information to all employees on a periodic basis.

Components of the Study

Figure 1 shows the proposed components of the study. The separate components are portrayed to indicate: a) their interrelatedness, b) the time flow, and c) the simultaneous nature of the four parts leading to the preparation of the final report.

Insert Figure 1 About Here

Part I

This part of the study concerns the requirement to conduct job analyses and rate employee positions. Four phases of activities are detailed.

(A) Phase A -- review of existing documentation and preparation for conducting various studies.

In this phase the study team should familiarize themselves with existing documents and conditions in the School System, make preparations for conducting job analyses, and, if appropriate, begin work with the Steering Committee regarding job analyses.

Task 1 - Analyze Mission and Function Statements, Organization Charts, and Previous Studies.

In order to build an information base from which future study considerations can be dealt with effectively, the study team should thoroughly analyze the existing documents (e.g., current salary schedules, position descriptions, employee ratings, and other pertinent documents in the areas of concern to the accomplishment of the study.

Task 2 - Sort Current Job Descriptions Into Categories and Identify Prototypes for Each Position.

It can be anticipated that current job descriptions can be placed in some five to ten categories. For example, common categories of employees in local school districts include: 1) classified Administrators, 2) secretarial and clerical employees, 3) professional and/or technical administrative support personnel (e.g., accountants, engineers, computer programmers, and computer operators), 4) bus drivers, 5) wage and hourly (classified) employees, 6) cafeteria (or lunchroom) employees, 7) custodians, 8) school health employees, 8) teachers, 9) certificated administrators, and 10) --. The above categories are provided as examples of potential categories of employees.

The development of prototypes for each position will serve to standardize jobs into uniform general duties

and responsibilities inherent within each position. More specific job descriptions may be prepared within each unit depending upon the needs of the particular unit so long as the general duties and responsibilities remain consistent with the standard, systemwide job description.

(B) Phase B -- auditing of positions, rating of employee positions, and determining the appropriateness of function placement.

The study team should conduct position audits (job analyses) for all incumbents. It is anticipated that all incumbents will provide position audit data through audit questionnaires. A sample of incumbents within each job and the supervisors of the specific employees should then be interviewed to validate the information derived from the audit questionnaires. The interview should serve to enhance and validate the information derived from the audit questionnaire.

Task 3 - Audit Positions Through Audit Questionnaires.

Supervisors should be requested to administer audit questionnaires and offer assistance to subordinates in filling out the questionnaires.

Task 4 - Audit Samples of Positions Through Interview With Incumbents and Supervisors.

An interview schedule should be established in coordination with the School System administration.

Task 5 - Collect and Analyze Data.

Interview information should be compared to audit questionnaire data to determine validity of questionnaire data. Duties, responsibilities, and requirements for each job should be determined and compared to the appropriate prototype.

Task 6 - Assess Accuracy of Job Descriptions Based Upon Position Audit Data.

While it can be anticipated that most job descriptions will accurately describe the duties and responsibilities of the positions, it is reasonable to assume that some descriptions will be inaccurate. The most useful job descriptions strike the proper balance between specificity and generality within the context of the particular organization. Each job description should be reviewed in light of the position audit data and the requirements of the School System.

Task 7 - Modify Job Descriptions and Develop Additional Job Descriptions As Needed.

Job descriptions should be modified, deleted or added based upon both the requirements of the System and the results of the position audits.

Task 8 - Assess the Appropriateness of Function Placement.

Where functions are clearly misplaced, recommendations should be made to the Steering Committee regarding the appropriate placement. Where functions are questionably placed, but not clearly misplaced, the study team should make appropriate recommendations.

Task 9 - Recommend Modifications of Function Placements as Needed.

The study team should recommend modifications based upon sound, generalizable personnel practices.

The proposed guidelines for assessing function placements and possible modifications include:

1. Overlaps in responsibility for carrying out specific organizational functions are purposive and minimal.
2. Activities within and among functions are inte-

grated, where appropriate, and position incumbents are aware of the interdependence of departments.

   a. Efforts are made to accommodate the missions of all departments where appropriate.
   b. Activities within and across functions are coordinated.

3. The span of control for each supervisor is appropriate.
   a. The span of control for most units does not exceed seven except in justifiable circumstances (three to five is generally regarded as appropriate). The span of control for certificated personnel does not exceed 14.
   b. The span of control is related to the function(s) to be served as well as the nature of the duties and responsibilities of the subordinates.

4. A well established and coherent chain of command is known by all employees.
   a. The established chain of command is almost always used for routing instructions, information, clarification, and recommendations.
   b. Subordinates demonstrate a willingness to accept authority and responsibility.
   c. Supervision of the work of subordinates en-

hances both the production and accountability of subordinates.

d. Supervisors support the activities of subordinates.

5. Offices housing position incumbents are appropriately dispersed geographically to enhance and encourage efficiency and effectiveness.

6. All functions or necessary support activities are served.

7. A sufficient number of levels in the hierarchy are operative in order to maintain a reasonable span of control, adequate communications, appropriate delegation of responsibility and authority, and service the necessary functions of the organization.

(C) Phase C -- jobs are placed into the appropriate salary/wage schedules or the jobs will be placed into appropriate sections of a unified salary/wage schedule.

Phase C of this part is the same as Phase C of Part II. The events (Phases A and B) identified in both Parts I and II will have to be completed prior to Phase C.

Task 10 - Determine the Appropriate Salary/Wage Schedule for Each Job.

Placement of jobs into the appropriate salary/wage schedules is a distinct classification procedure. Placement should be made on the basis of defined series of jobs.

Task 11 - Determine the Appropriate Placement Level Within the Appropriate Salary/Wage Schedule.

While jobs should be placed on schedules dependent upon defined series of jobs, the placement within a schedule is dependent upon classification (grade) of the job within the appropriate series. For example, welders and bus mechanics may be placed in the same series (e. g., Wage Grade) but they may be placed at different levels in the schedule dependent upon standard requirements of the jobs. The study team should provide the rationale (based upon sound personnel practices) for series (schedule) and grade (level) placement for each job.

Task 12 - If a Unified Salary/Wage Schedule (a Master Schedule Containing the Rates of All Employees, With the Exception of Certain Specified Upper Echelon Administrators) is Desired, Then Each Job Should be Placed at the Appropriate Level Within the Unified Schedule.

The procedures employed should be the same as those employed in Task 11.

Task 13 - If Alternate Salary/Wage Schedules are Utilized, then Each Position Should be Placed at the Appropriate Level on the Appropriate Schedule.

Rather than develop a single set of schedules for the various job series or a unified salary/wage schedule, the Study Team may elect to review various alternative schedules or sets of schedules.

(D) Phase D -- cataloging of job descriptions.

This phase consists of cataloging, alphabetizing, editing, indexing, and making arrangements for future use of job descriptions in the compensation program.

Task 14 - Reassess Categorization of Job Descriptions in Light of Modifications, Additions, Functional Placement, and Assessment From Previous Tasks.

This is essentially a final review of the classification of jobs.

Task 15 - Edit Job Descriptions.

This should be carried out in order to develop the necessary documents for use in the compensation program.

Task 16 - Catalog According to Job Groups (Series) in Alphabetical Order of Job Titles.

This represents a basic product of Part I.

Part II

(A) Phase A -- collection and analysis of salary, wage, and classification data.

This phase is primarily concerned with establishment of a data base as it relates to wages and salaries being paid in the prevailing rate area and their relationship to rates being paid in the School System.

Task 1 - Collect and Analyze Salary and Wage Data From the School System and From Similar and/or related sources in the Prevailing Rate Area.

Written, and if necessary, personal contact should be made with the other school systems, both public and private in the surrounding areas, to obtain salary and wage data. Contacts should also be made with the Department of Labor, Bureau of Labor Statistics, to obtain wage and salary prevailing rates for applicable positions. This information should be supplemented by data from local county and city governments, as well as, local business and industry.

Task 2 - Compare Data and Establish Wage and Salary Ranges for Occupational Series or Classes of Positions

Data should be analyzed and comparisons be made for appropriate Key Positions in the prevailing rate area. Data should be established for all classification levels.

Task 3 - Compare Wage and Salary Data by Representative Occupational Series and Classification Levels for Positions in the School System.

The results of data survey should be compared with wages and salaries being received by similar type functions in the School System and areas of deviation pinpointed.

(B) Phase B -- Development of salary/wage schedules.

In this phase decisions are made as to whether unified or separate schedules are to be used. After these decisions are made, schedules are constructed and indexed.

Task 4 -- Decide on the use of a unified schedule or separate schedules.

The positive and negative effects of the implementation of a unified schedule and alternate schedules based on a cluster approach should be discussed and considered. A decision must then be made, based on which system offers the greatest positive benefits with the least negative effects, as to which route the district wishes to take.

Task 5 -- Develop salary schedule(s).

Based on data collected in Phase A and local, state, and federal law, salary schedules are constructed and indexed.

(C) Phase C -- This is the same as Part I, Phase C.

Part III

(A&B) Phases A & B -- Develop an appropriate Management Plan.

Task 1 - Develop an appropriate Management Plan. A Management Plan which will facilitate the implementation of any recommendations arising from the study should be developed. The plan should be in a form that will allow for the implementation of part

or all of the recommendations as the School Board may see fit.

(C&D) Phases C & D -- Develop a process for maintaining the salary compensation program.

Task 2 - Using the Management Plan Developed in Part III, Phases A&B, Develop Detailed Policies and Procedures for Maintaining the Salary Compensation Program on a Current Basis.

Detailed policies and procedures should be developed which will allow for the maintenance of the compensation program. These policy and procedure statements should reflect the decisions made in the development of the management plan developed in Part III, Phase B.

FIGURE 1. COMPONENTS OF A SALARY/WAGE STUDY

	PHASE A	PHASE B	PHASE C	PHASE D
PART I	REVIEW EXISTING DOCUMENTATION & PREPARE FOR CONDUCTING STUDY	AUDIT POSITIONS, RATE EMPLOYEE POSITIONS & DETERMINE APPROPRIATENESS OF FUNCTION PLACEMENT	PLACE JOBS INTO APPROPRIATE SALARY/WAGE SCHEDULES OR PLACE JOBS INTO APPROPRIATE SECTIONS OF A UNIFIED SALARY/ WAGE SCHEDULE	CATALOG JOB DESCRIPTIONS
PART II	COLLECT & ANALYZE SALARY, WAGE, & CLASSIFICATION DATA	DEVELOP SALARY/ WAGE SCHEDULES		SIMULATE PERSONNEL COSTS
PART III	DEVELOP AN APPROPRIATE MANAGEMENT MODELING SCHEMA	SELECT THE MOST DESIRABLE MAJOR COMPONENTS AND SUBCOMPONENTS	DEVELOP THE SPECIFIC PROCESS FOR MAINTAINING THE COMPENSATION PROGRAM	